

Message Text

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INFO AMEMBASSY COPENHAGEN

AMEMBASSY HELSINKI

AMEMBASSY LONDON

AMEMBASSY PARIS

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AMEMBASSY STOCKHOLM

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C O N F I D E N T I A L SECTION 1 OF 2 OSLO 1744

EO 11652: GDS

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SUBJECT: NORWEGIAN OIL POLICY AND U.S. INTERESTS, PART I

SUMMARY. IN THIS TWO-PART MESSAGE, WE EXPLORE THE IMPLICATIONS
FOR U.S. INTERESTS OF NORWAY'S OIL AND GAS POLICY.

THE PUBLICATION OF THE NORWEGIAN GOVERNMENT'S POLICY
GUIDELINES ON OIL DEVELOPMENT, INDICATIONS THAT

AMERICAN COMPANIES ARE TO HAVE A QUITE LIMITED
ROLE IN THIS DEVELOPMENT, AND PRESSURE ON NORWAY
TO MAKE CONCESSIONS TO THE USSR ON THE QUESTION OF

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JOINT OIL DEVELOPMENT IN THE BARENTS SEA LEND SOME

URGENCY TO THIS ANALYSIS.

WE EXAMINE BELOW THE AREAS IN WHICH NORWEGIAN OIL POLICY CONFLICTS WITH U.S. INTERESTS, THE DIFFICULTY OF PERSUADING NORWAY TO MODIFY ITS POLICY, THE OPTIONS OPEN TO US, AND THE POSSIBLE INDUCEMENTS WHICH WE MIGHT OFFER THE NORWEGIANS TO OBTAIN RECIPROCAL CONCESSIONS. THE MAIN PURPOSE OF THIS ANALYSIS IS TO STIMULATE THE U.S. GOVERNMENT TO ASK ITSELF WHETHER IT HAS ANY INTEREST: IN INFLUENCING NORWEGIAN OIL POLICY, IN SUPPORTING U.S. COMPANIES ENGAGED IN OIL DEVELOPMENT OFF NORWAY, OR IN EXPORTING VARIOUS COMMODITIES OR EQUIPMENT TO NORWAY IN EXCHANGE FOR OIL AND GAS. END SUMMARY.

1. THE STAKE. THERE IS LITTLE DOUBT THAT THE OIL AND GAS RESERVES OFF NORWAY ARE VERY LARGE. ON THE BASIS OF PROVEN RESERVES AND PRESENT DEVELOPMENT POLICY, NORWAY WILL PRODUCE BY 1980/81 AS MUCH OIL AS ALGERIA DID LAST YEAR, AND NEARLY AS MUCH GAS AS OIL. EXPLOITABLE RESERVES IN THE NORWEGIAN PORTION OF THE NORTH SEA ARE ESTIMATED AT 1 TO 2 MILLION METRIC TONS OF OIL AND 1 TO 2 TRILLION CUBIC METERS OF GAS, WITH THE NORWEGIAN AND BARENTS SEA ALSO BELIEVED TO BE CONTAIN VERY LARGE RESERVES. IF NORWAY WERE TO DOUBLE ITS PRESENTLY-PROJECTED PRODUCTION BY 1980/81 (U.S. COMPANIES CLAIM THIS WOULD NOT BE DIFFICULT), NORWAY COULD SUPPLY 10-12 PERCENT OF THE ENERGY NEEDS OF WESTERN EUROPE (EXCLUSIVE OF ANY EXPORTS OF GAS) OR ROUGHLY 20 PERCENT OF U.S. IMPORT NEEDS (BASED IN EACH CASE ON PRE-ENERGY-CRISIS PROJECTIONS FOR 1980/81).

2. AREAS OF POLICY CONFLICT. AS IT IS EVOLVING, NORWEGIAN OIL POLICY RUNS COUNTER TO U.S. INTERESTS, AT LEAST IN THE ENERGY AND COMMERCIAL FIELD, FROM SEVERAL STANDPOINTS:

A. RATE OF FOSSILE FUEL DEVELOPMENT. BY 1980/81, WESTERN EUROPE WILL CERTAINLY NEED STABLE SOURCES OF ENERGY TO FUEL ITS EXPANDING INDUSTRY, AND THE U.S. MAY ALSO FIND IT STILL MUST IMPORT OIL AND GAS. WITH THIS POTENTIALLY EXPANDING FUTURE DEMAND IN MIND, THE WASHINGTON ENERGY CONFERENCE IN ITS COMMUNIQUE CALLED

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FOR AN ACCELERATION IN THE DEVELOPMENT OF ADDITIONAL ENERGY SOURCES. YET TWO DAYS LATER THE BRATTELI GOVERNMENT SENT TO PARLIAMENT A REPORT (SEE OSLO 792) WHICH PROPOSES THAT NORWEGIAN OIL AND GAS PRODUCTION SHOULD BE KEPT AT ABOUT THE LEVEL NOW PROJECTED FOR THE EARLY 1980S FROM FIELDS PRESENTLY UNDER DEVELOPMENT, AND THAT EXPLORATION FOR MORE RESERVES SHOULD BE LIMITED SO THAT PROVEN RESERVES

DO NOT GREATLY EXCEED PRESENT LEVELS. NORWAY OBVIOUSLY
COULD DO MORE TO MEET THE NEEDS OF ITS ALLIES IN AN
ENERGY-SHORT WORLD.

B. COMMERCIAL INTERESTS. AMERICAN OIL COMPANIES HAVE BEEN IN
THE FOREFRONT OF NORWEGIAN OIL AND GAS DEVELOPMENT. AN EXPANDING
NUMBER OF MAJOR FIRMS HAS SHOWN GREAT INTEREST IN OBTAINING
ADDITIONAL EXPLORATION AND DEVELOPMENT RIGHTS--IN THE FACE OF
FIERCE COMPETITION, OF COSTS RUNNING INTO THE BILLIONS, AND OF
STIFF NORWEGIAN TERMS. THEY CAN NOW LOOK FORWARD TO HAVING THEIR
ROLE PROGRESSIVELY REDUCED AND TAKEN OVER BY THE NORWEGIAN GOVERN-
MENT AND NORWEGIAN COMPANIES. RECENT NORWEGIAN POLICY REPORTS
ARGUE THAT OIL AND GAS ARE MUCH TOO IMPORTANT SOCIAL PRODUCTS TO
BE LEFT TO THE PRIVATE SECTOR AND THE BENEFITS SHOULD ACCRUE TO THE
STATE FOR WELFARE AND SOCIAL PURPOSES, INCLUDING THE PURCHASE OF
PRIVATE INDUSTRY. THE FINANCE MINISTRY'S OIL REPORT CALLS FOR THE
NORWEGIAN GOVERNMENT TO CONTROL: EXPLORATION, PRODUCTION, PROCES-
SING, EXPORT AND MARKETING. STATOIL, THE SEMI-PRIVATE NORSK HYDRO,
AND THE PRIVATE SAGA PETROLEUM COMPANY ARE TO BE ITS PRINCIPAL
POLICY ARMS. THE REPORT PREDICTS THAT: "OVER THE LONG TERM, THE
MULTINATIONAL FIRMS....WILL BASICALLY PARTICIPATE AS CONSULTANTS,
CONTRACTORS AND POSSIBLE MINORITY PARTNERS;" AND THAT A FULLY
NORWEGIAN MARKETING ORGANIZATION IS TO BE ESTABLISHED BUT "FOR A
LONG TIME" MUCH OF NORWEGIAN PRODUCTION WILL STILL HAVE TO BE
MARKETED "IN COOPERATION WITH MULTI-NATIONAL COMPANIES." WHILE
NORWAY REMAINS A MARKET ECONOMY, THE TREND TO ENCOURAGE COMPANIES
OPERATING ON THE NORWEGIAN CONTINENTAL SHELF TO USE NORWEGIAN-
BUILT DRILLING RIGS AND EQUIPMENT IS ALSO LIKELY TO INCREASE--
REDUCING A LUCRATIVE U.S. EXPORT MARKET.

C. ECONOMIC POLICY. THE TREND IN THE OIL REPORT
TO RESOLVE THE ECONOMIC PROBLEMS POSED BY A POTENTIAL
OIL BOOM BY HIGHLY RESTRICTIVE MEASURES (E.G. MINIMAL
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IMMIGRATION, DAMPENED RATE OF EXPLORATION, STRENGTHENING
OF STATE SECTOR) RUN COUNTER TO OUR LONG-STANDING
EFFORTS IN THE OECD AND GATT TO LIBERALIZE ECONOMIC
POLICIES. TO THE EXTENT THAT PRESENT NORWEGIAN POLICY
TENDS ALSO TO BE PRO-OPEC AND ANTI-MULTINATIONAL
COMPANIES, IT RUBS UP AGAINST OUR POLICIES AS WELL
AS CATERES TO THE VIEWS OF THE MORE IDEOLOGICAL,
ANTI-CAPITALIST, AND OFTEN ANTI-U.S. ELEMENTS IN NORWAY.

D. NORDIC TIES. USING ITS OIL WEALTH TO ASSIST ITS NORDIC NEIGH-
BORS IS, AS THE OIL POLICY REPORT NOTES, A "NATURAL" DEVELOPMENT
FOR NORWAY. IT IS ALSO ARGUABLY IN THE BROADER U.S. INTEREST FOR
SWEDEN AND FINLAND TO HAVE GUARANTEED SUPPLIES OF OIL AND OIL
PRODUCTS FROM NORWAY RATHER THAN FROM THE USSR. AT THE SAME TIME,
IF NORWAY WERE TO CONCENTRATE ON NORDIC ARRANGEMENTS AT THE

EXPENSE OF ITS WEST EUROPEAN ALLIES THIS COULD STRENGTHEN
NEUTRALIST TRENDS WITHIN NORWAY ITSELF AND WOULD BE DAMAGING
TO U.S. INTERESTS.

E. OIL IN THE NORTH. WE HAVE NOT YET DECIDED APPARENTLY WHETHER
WE HAVE THE RIGHT TO WORK THE CONTINENTAL SHELF OFF SVALBARD
UNDER THE 1920 TREATY--BUT WE DO KNOW IT IS NOT IN OUR INTEREST--
OR INDEED NORWAY'S INTEREST--TO SEE A SOVIET-NORWEGIAN CONDOMI-
NIUM ESTABLISHED IN THIS WHOLE NORTHERN AREA, WHICH WOULD PRECLUDE
AN AMERICAN PRESENCE. WE SUSPECT, HOWEVER, THAT IN PROPOSING JOINT
OIL EXPLORATION OPERATIONS IN THE BARENTS SEA, AND AT THE SAME
TIME ARGUING AGAINST ANY OTHER "FOREIGN" PRESENCE, THE USSR MAY
BE TRYING TO EXTEND ITS OWN HEGEMONY OVER THIS NORTHERN AREA,
UNDER THE COVER OF RESPECT FOR NORWEGIAN SOVEREIGNTY. TO ACCEPT
NORWEGIAN SOVEREIGNTY OVER THE WHOLE CONTINENTAL SHELF BETWEEN
NORTH NORWAY AND SVALBARD COULD MEAN TO CLOSE THIS AREA TO
EFFECTIVE AMERICAN COMMERCIAL INTEREST (THIS SUBJECT IS DISCUSSED
IN GREATER DETAIL IN OSLO 1606 AND 1607).

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C O N F I D E N T I A L SECTION 2 OF 2 OSLO 1744

3. CHANGING NORWEGIAN POLICY. BY FOCUSING ATTENTION ON SOME KEY DOMESTIC AND FOREIGN POLICY QUESTIONS, THE OIL BOOM RISKS ACCENTUATING SOME LONG-STANDING TRENDS IN NORWAY WHICH AFFECT AND CONCERN US (E.G. NATIONALISTIC EFFORTS TO LIMIT ANY FOREIGN PRESENCE; ENCOURAGEMENT OF THE STATE SECTOR; OVER-SENSITIVITY TO SOVIET SECURITY CONCERNS). NON-SOCIALIST CIRCLES IN NORWEGIAN SOCIETY WHICH SHARE OUR CONCERNS WOULD FEEL THEIR HAND HAD BEEN STRENGTHENED IF THE PRESENT OIL POLICY WERE MODERATED. PRESENT OIL POLICY ADMITTEDLY HAS TOO DEEP PSYCHOLOGICAL ROOTS TO BE MODIFIED EASILY BUT THERE ARE SOME AIMS ON THE SCALE OF POSSIBLE U.S. OBJECTIVES (DISCUSSED BELOW) WHICH MAY PROVE TO BE REALISTIC
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AND USEFUL.

A. MAKE HASTE SLOWLY. NORWAY'S GO SLOW OIL POLICY IS SUPPORTED BY ALL PARTIES. THE NORWEGIANS HAVE CONVINCED THEMSELVES THAT: (I) NORWEGIAN OUTPUT IN 1980 WILL EQUAL ONLY THE ANNUAL INCREASE IN CONSUMPTION IN WESTERN EUROPE, AND NOT THEREFORE HAVE ANY SIGNIFICANT IMPACT ON WEST EUROPE'S DEPENDENCE ON ARAB OIL; (II) IT TAKES TEN YEARS TO DEVELOP NEW FIELDS IN THE NORTH SEA (MOBIL SAY IT CAN BE CUT TO TWO YEARS) AND BY THEN WORLD ENERGY SUPPLIES WILL BE PLENTIFUL IN VIEW OF THE CURRENT PRICE OF OIL; (III) ENERGY SOURCES ARE FINITE AND THE WEST MAY BE THANKFUL THAT NORWAY CONSERVED ITS OIL AND GAS; BUT WHAT IS MUCH MORE SIGNIFICANT, (IV) AN OIL BOOM WILL BRING INCREASED INFLATION, COMPETITION FOR SCARCE LABOR, DAMAGE TO LONG-STANDING INDUSTRIES, AN EVENTUAL NECESSITY TO IMPORT FOREIGN LABOR (UNIVERSALLY OPPOSED IN NORWAY)--AND AN EARLY EXHAUSTION OF OIL RESERVES LEADING TO MASSIVE UNEMPLOYMENT. THE NORWEGIANS ARE SUFFICIENTLY PROSPEROUS TO GIVE PRIORITY TO PRESERVING A PLEASANT WAY OF LIFE AND NOT RUN THE RISKS OF AN OIL BOOM.

B. STATE VERSUS PRIVATE INDUSTRY. IN CONTRAST TO THE STRONG SUPPORT FOR A "GO SLOW" OIL DEVELOPMENT POLICY, THERE IS OPPOSITION TO THE LABOR PARTY'S PROGRAM OF BUILDING UP A LARGE STATE SECTOR OIL INDUSTRY--BUT WHETHER THIS OPPOSITION WILL BE EFFECTIVE IS QUESTIONABLE. AT LEAST, THERE IS THE POSSIBILITY OF FINDING POLITICAL SUPPORT AMONG NON-SOCIALIST ELEMENTS WHO BELIEVE IT WOULD BE CHEAPER AND MORE EFFICIENT TO MAINTAIN A BALANCE BETWEEN THE STATE AND PRIVATE OIL SECTOR. IF THE NON-SOCIALISTS

CAN MODERATE THE LABOR PARTY'S PROGRAM BY THEIR
OPPOSITION, AMERICAN OIL FIRMS MAY HAVE A LARGER
ROLE TO PLAY THAN NOW APPEARS LIKELY.

C. HOW TO SPEND THE MONEY. NORWEGIANS ANGUISH
OVER A PROBLEM OTHERS WOULD LIKE TO HAVE: HOW TO
SPEND THEIR NEW OIL REVENUES WITHOUT HARMING THE
NORWEGIAN WAY OF LIFE. ENCOURAGING NORWAY TO USE
ITS OIL TO PURCHASE MORE IN THE U.S. IS AT LEAST
SIMPLER THAN PERSUADING THE GOVERNMENT TO CHANGE KEY
ASPECTS OF ITS OIL POLICY.
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D. U.S. ROLE IN THE NORTH. A NUMBER OF
NORWEGIAN OFFICIALS AND POLITICAL SCIENTISTS ARE
INTERESTED IN SEEING THE U.S. PLAY A MORE ACTIVE
ROLE IN THE ARCTIC TO COUNTER-BALANCE SOVIET PRESSURE.
THEY SPECIFICALLY CONSIDER AMERICAN OIL RIGS A
USEFUL FORM OF VISIBLE INVOLVEMENT. SOME HIGH
OFFICIALS, HOWEVER, (INCLUDING PERHAPS THE PRIME
MINISTER) ARE INCLINED TO HEED SOVIET WARNINGS
AGAINST A "FOREIGN" PRESENCE IN THE BARENTS SEA.
THERE WOULD SEEM TO BE SOME ROOM HERE, AT LEAST,
FOR A MODEST AMERICAN PRESENCE IF WE PLAY OUR CARDS
WELL (DISCUSSED IN SEPTTEL).

4. THE OPTIONS. THE CHOICES OPEN TO US WOULD SEEM TO BE
BROADER IN THEORY THAN REALITY.

A. TO MAKE A MAJOR DIRECT EFFORT TO INDUCE NORWAY
TO ACCELERATE DEVELOPMENT OF OIL AND GAS RESOURCES WOULD
PROBABLY STIFFEN NORWEGIAN RESISTANCE--AND CERTAINLY
BE EXPLOITED BY THE LEFT AS AN EFFORT TO STRENGTHEN
THE MULTINATIONAL COMPANIES AT THE EXPENSE OF NORWAY'S
SOVEREIGNTY AND ITS SOCIALIST PROGRAM.

B. TO ACCOMMODATE OURSELVES TOTALLY TO NORWEGIAN
POLICY IS OBVIOUSLY THE COURSE OF LEAST RESISTANCE.
IT WOULD TEND TO MINIMIZE FRICTION AND KEEP THE U.S.
OUT OF THE MIDDLE OF THE DEBATE SHAPING UP BETWEEN
THE SOCIALIST AND NON-SOCIALIST SECTORS OF NORWEGIAN
OPINION OVER THE ROLE OF STATOIL.

C. AS WE HAVE SUGGESTED ABOVE, HOWEVER, WE MAY
BE ABLE TO ACHIEVE CERTAIN MORE MODEST OBJECTIVES
PROVIDED WE SET OURSELVES SPECIFIC AIMS. FOR EXAMPLE,
IF WE WANT A LARGER SHARE OF NORWEGIAN OIL FOR
FUTURE AMERICAN CONSUMPTION, A LARGER SHARE OF THE
OFFSHORE ACTION FOR AMERICAN COMPANIES, AN OPPORTUNITY

TO DRILL OFF NORTH NORWAY, OR AN INCREASE IN
SALES OF PARTICULAR COMMODITIES TO NORWAY--WE MUST
ANALYSE WHAT IT IS WE CAN OFFER NORWAY IN EXCHANGE.
WE WILL NEED TO SELECT AN APPROACH AND ARGUMENTS
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WHICH ARE SPECIFICALLY TAILORED TO MEET NORWEGIAN
OBJECTIONS E.G. REGARDING THE INFLATIONARY, SOCIAL-
ECONOMIC IMPACT OF OUR PROPOSAL. WE MUST ALSO SEE
WHAT LEVERAGE WE MAY HAVE IN AREAS OF SPECIAL
NORWEGIAN INTEREST AND HOW WE CAN USE IT WITHOUT
SEEMING TO "PRESSURE" NORWAY.

5. IN PART II OF THIS MESSAGE, WE HAVE TRIED TO
IDENTIFY INDUCEMENTS AND ARGUMENTS WHICH MIGHT SUPPORT
SPECIFIC OBJECTIVES. SOME OF THESE SUGGESTIONS
COULD BE EXAMINED IN CLOSER DETAIL IF THEY ARE
CONSIDERED OF INTEREST--BUT FIRST THE DEPARTMENT
MUST DECIDE WHAT AIMS, IF ANY, IT CONSIDER WORTH
PURSUING. IF THE DEPARTMENT PREFERS NOT TO TRY TO
INFLUENCE NORWEGIAN OIL POLICY AND TO LET OUR OIL
COMPANIES FEND FOR THEMSELVES, WE NEED TO KNOW NOW
THAT THIS IS OUR POLICY. BUCHANAN

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